BUDGET DOCUMENT CHECKLIST
FOR MUNICIPAL CORPORATIONS

Instructions: Use this checklist to see if your budget is complete.
(1) Use one checklist per budget document.
(2) Inventory and check the items listed below that must be contained in your budget document.
(3) Check the appropriate distribution point for each of the copies of your budget document.
(4) Attach a checklist to the front of each budget document.

Name of District _____

Mailing Address			☐ Check if new address
City	State	ZIP Code	County
Name of Contact Person	Title		Daytime Telephone No.

Inventory of Items in Budget Document:

☑ The newspaper clipping of the Notice of the First Budget Committee Meeting showing the date published; or an affidavit of publication, accompanying a copy of the actual publication.

☑ The newpaper clipping of the Notice of Budget Hearing and the Financial Summary showing the date published; or an affidavit of publication, accompanying a copy of the actual publication; or an affidavit of posting or mailing and a copy of the summary that was posted or mailed.

☑ The newspaper clipping of the Second Notice of the Budget Hearing showing the date published; or an affidavit of publication, accompanying a copy of the actual publication.

☑ **All** the budget detail sheets.

☑ The three resolution statements that adopt the budget, make appropriations, and levy taxes.

☑ Form LB-50 or ED-50, copy both front and back.

☑ M-5 Certification form.

Distribution of Budget Documents

If district is levying a tax on LB-50 or ED-50:

☐ 2 copies to county assessor of primary county.

☐ 1 extra unbound copy of both the LB-50 or ED-50 (front and back) and the M-5 form to county assessor.

☐ 1 copy to county assessor of joint counties if district is levying a tax in more than one county.

☐ 1 copy to county clerk.

☐ 1 copy to county treasurer if treasurer makes bond payments.

☐ 1 copy to Tax Supervising and Conservation Commission if district is in Multnomah County.

☐ 1 copy to Education Service District if a school district.

☐ 1 copy to Department of Education if a school district.

If district is NOT levying a tax:

☐ 1 copy to Department of Revenue.

☐ 2 unbound copies of the M-5 form to county assessor(s) if applicable.

☐ 1 copy to county clerk.

☐ 1 copy to Tax Supervising and Conservation Commission if district is in Multnomah County.

☐ 1 copy to Education Service District if a school district.

☐ 1 copy to Department of Education if a school district.